17. Set Up/Maintain Purchasing System Codes

17.1   **Introduction**   This procedure describes how to set up and maintain the required purchasing codes/code values in the system. The codes correspond to the data fields required for reporting procurement data to the Federal Procurement Data System (FPDS) and to the Commerce Procurement Data System (CPDS). The code values correspond to the allowable values for each data field. Each code can be assigned an unlimited number of code values. The purchasing code data is entered via the CSPS "Purchasing System Code Maintenance Screen" (PR004).

17.2   **Who Performs the Procedure**   Designated procurement personnel will be responsible for entering and maintaining the purchasing code information.

17.3   **Initiating the Process**   Purchasing code information is entered when new codes/code values need to be established or existing codes/code values need to be changed. In general, these codes will only need to be updated when there are changes to the FPDS or CPDS reporting requirements.

17.4   **Accessing the System**   From the Main Menu, select Maintenance. From the Maintenance menu, select Procurement. From the Procurement menu, select "PR004 - Purchasing Codes". Follow the steps below for PR004.

17.5 **Creating a New** This procedure describes the steps necessary to create and
Code Value activate a new code value for an existing code.

PR004 - Purchasing System Code Maintenance Screen

STEP	ACTION
1.	Select the **CODE** in the upper control block for which you intend to create a new code value. Note: To select a **CODE**, place the cursor in the **CODE** field or **CODE** Title and use the "down" and "up" arrows on the toolbar or on the keyboard to scroll through the codes in the system. The "query" icons in the toolbar can also be used to identify a subset of codes. Note: The basic code values found on this screen are used in such reports as the SF-281 and CD-409.
2.	Place the cursor on any **CODE VALUE** field in the lower control block(i.e., CODE VALUE, DESCRIPTION, etc.) and click on the "Create Record" icon in the toolbar (i.e., the "green plus" icon). A blank record will be created.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

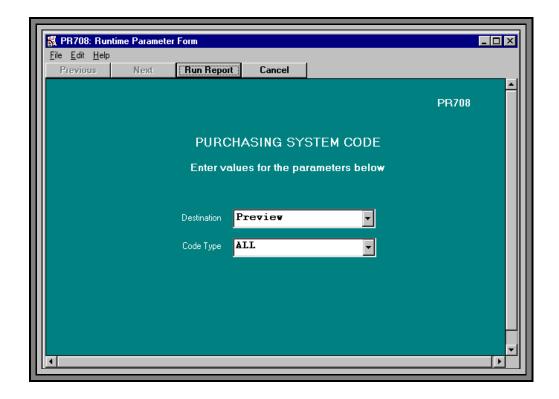| STEP	ACTION
3.	In the **CODE VALUE** field, enter the new code value.
4.	In the **DESCRIPTION** field, enter the description of the new code value.
5.	In the **ACTIVE** field, click the field using the mouse or press the space bar to make the code value active and available for use. If the code value should be inactive, leave this field blank.
6.	The **STAT DATE** field, reflects the date which a new code value was created.

17.6   **Querying a**   This procedure describes the steps necessary to query and
        Purchasing   display one or more purchasing codes.
        Code

STEP	ACTION
1.	Place the cursor in the **CODE** field or **CODE** Title field (i.e. the upper control block) or in the **CODE VALUE** (i.e. the lower control block) and click on the "Enter Query" icon on the toolbar. Then, there are several options for querying: To retrieve all records in the system, do not enter data in any of the fields. To retrieve only a single code, double click on the **CODE** field and a list-of-values identifying all **CODES** will appear. Select the applicable CODE and click "OK". To retrieve only a subset of records, enter the relevant information in the applicable fields to narrow the search. The '%' character can be used in most fields as a wildcard character. For example, to query all records that include an 'r', type %r%.
2.	Click the "Execute Query" icon in the toolbar to execute the query. The system will retrieve all codes (and the corresponding code values) meeting the specified criteria.
3.	Use the "down" and "up" arrows in the toolbar or on the keyboard to view the retrieved **CODES**. To view the **CODE VALUES** associated with a **CODE**, place the cursor on any **CODE VALUE** field (i.e., CODE VALUE, DESCRIPTION, etc.) and use the "down" and "up" arrows in the toolbar or keyboard to scroll through the data.

17.7   **Printing (Running)**   This procedure describes the steps necessary to run the
             the Purchasing   "PR708 - Purchasing System Codes Report".
             System Codes
             Report

PR708 - Runtime Parameter Form (Purch System Codes)

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
1.	To run the "PR708 - Purchasing System Codes Report", a. Click the "Printer" icon in the toolbar while the Purchasing System CodeMaintenance Screen (PR004) window is open and active, or b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement select "PR708 - Purch System Codes". Note: This report will print all of the tables and sub-tables contained within PR004.
PR708: Runtime Parameter Form	
2.	To select the destination of the report, click the pull down menu in the **DESTINATION** field and select the appropriate destination: a.　　　To view the report on the screen, select "Screen". b.　　　To send the report to a specific file, select "File". c.　　　To send the report to the printer, select "Printer". d.　　　To send the report to a mail file, select "Mail". e.　　　To view the report on the screen, select "Preview". After selecting the destination, go to Step 3.
3.	To select the code type for the report, click the pull down menu in the **CODE TYPE** field and select the appropriate code type. Note: To run a report for all code type's, select "All".
4.	Click the "RUN REPORT" pushbutton to execute the selection made. Proceed to Step 6.
5.	Click the "CANCEL" pushbutton to cancel the report selections made. Note: Upon clicking the "CANCEL" button the Runtime Parameter Form will close and exit the user to the last active screen.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
	IF...	**THEN...**
6.	The destination selected is "Screen" or "Preview"... and The "RUN REPORT" pushbutton is clicked...	a. To go to the next page of the report, click the "NEXT" pushbutton. b. To go to the previous page of the report, click the "PREV" pushbutton. c. To go to the last page of the report, click the "LAST" pushbutton. d. To go to the first page of the report, click the "FIRST" pushbutton. e. To go to a specific page of the report, enter the page number and then click the "PAGE" pushbutton. f. To print the report, click the "PRINT" pushbutton. g. To send the report to a mail file, click the "MAIL" pushbutton. This functionality is currently not available. h. To close the report, click the "CLOSE" pushbutton. i. To open a second report window, click the "NEW" pushbutton.